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ICT Usage Survey Part Two

Available Data on Internet Usage in Brighton and Hove

Final Draft, June 2004

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Executive Summary - Internet Usage in Brighton and Hove

1. There is no direct publicly available information on internet usage across Brighton and Hove

2. Based on national level survey data combined with information on the people living in the city, in Brighton and Hove ...

- 128,000 adults (62%) across the city have used the internet in the last 3 months, 7% above the national average
- 64,000 households (54%) across the city have internet access, 13% above the national average
- 12,400 households (10.8%) across the city have broadband access

3. Brighton and Hove internet use is above the national average because ...

- the city is significantly better educated than the national average
- there are high proportions of students across the city
- the city is significantly younger than the average

4. These estimates are likely to be an undercount, as they do not take into account the concentration of new media and IT businesses and professionals across the city.

5. However there are areas where internet usage is likely to be far lower than the city as a whole, in particular East Brighton and Moulscombe.

6. For more accurate estimates of internet usage across the city, in-depth survey work is required.

Section 1: Introduction

theplacetobe.net aims to provide a focal point for internet use by the communities of Brighton and Hove. To do this, it is important to understand how many people across the city are using the internet, what they are using the internet for, and also what communities may not be using the internet.

Internet use across the country has increased enormously over in recent years, with approximately half of all people in the country using the internet regularly, and nearly half of all households able to access the internet. There is also increasing use of more powerful internet technologies, with an additional 40,000 households connecting up to broadband access *every week* (see “Background - Internet Usage across the UK” panel).

Background - Internet Usage across the UK¹

- 30 million people, half the population of the UK use the Internet regularly
- 58% of all adults in the UK have used the internet in the previous month
- 45% of internet users use the Internet every day or almost every day
- 82% of individuals who access the Internet do so from their home, 45% from work
- 11.9 million households, 48% of all UK households, have Internet connectivity
- 20% of Internet households are now using broadband connections
- 17% of online population access through broadband connection
- Broadband connections are increasing at 40,000 per week

Although the national trends are revealed through survey work by the Office for National Statistics (ONS), MORI and other research groups, there is surprisingly little data at local levels - in particular there is **no publicly available information on internet usage across Brighton and Hove**.

This report uses the nationally available survey information, combined with Census and other information across Brighton and Hove, to estimate the internet usage across the city, and what areas across the city are likely to have low levels of usage.

¹ Source: Office for National Statistics, *Internet Access report*, Dec 2003. Ofcom, *Internet and Broadband Update*, April 2004 (www.egovmonitor.com/links?1260).

Section 2: Who's using the Internet in Brighton and Hove?

Brighton and Hove is a new city of 260,000 people, with one of the largest concentrations of new media and IT businesses and professionals outside London. It is likely that internet use is higher than the national average, but there is no direct information available on this.

Using information from the ONS and other internet surveys on the proportions of people using the internet at the national level, we can directly estimate the numbers of people likely to be using the internet across Brighton and Hove. **However this is likely to significantly undercount the true numbers** - Brighton and Hove has a large well-educated young population, who are likely to be heavy users of the internet.

2.1 Internet usage across Brighton and Hove?

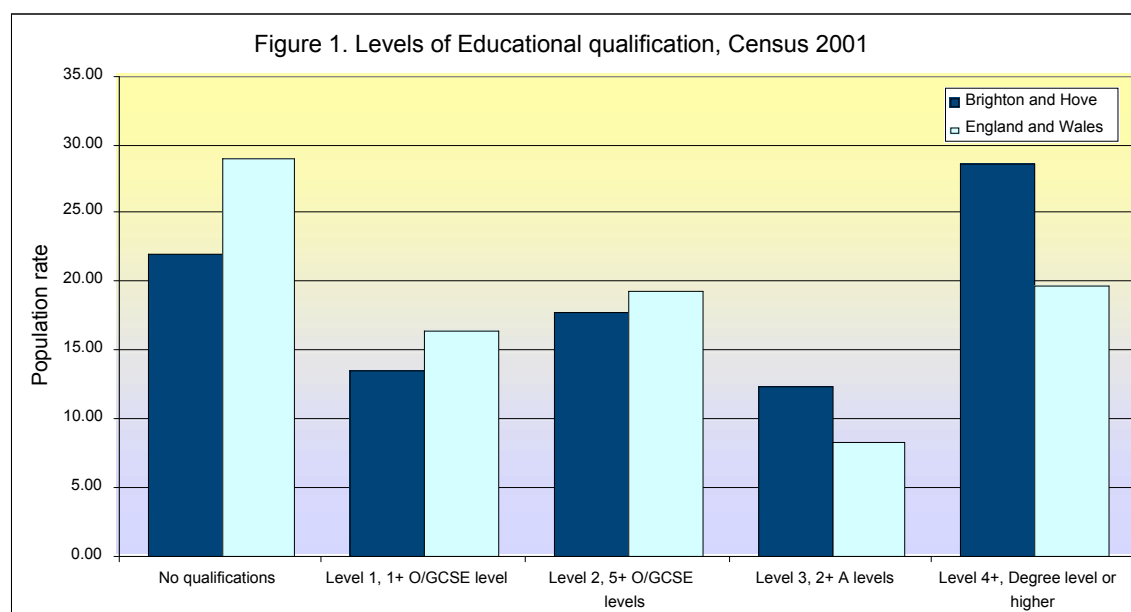
Internet usage and home internet connection is weighted towards people with higher incomes and higher levels of education (see Background - Internet Usage by level of education and income bracket below). Using this survey information on internet use by education, and household connection by income 10% bands, we can estimate internet usage across the city more accurately than by simply applying the national level proportions of people using the internet.

Background - Internet Usage by level of education and income bracket²

- 95% of people with degree level or higher use the internet, compared with 51% of those with no qualifications
- 86% of people in the highest income 10% band have home connections to the internet, compared with 12% in the lowest income 10% band
- 74% of people in social group AB use the internet, compared with 25% of people in DE group

² Source: Oxford Internet Institute survey, 2003. Office for National Statistics, *Internet Access report*, Dec 2003.

Figure 1 shows the level of educational achievement across Brighton and Hove compared with England and Wales³ - people in Brighton and Hove are significantly better educated than the national average. Similarly the proportion of full-time students is far higher, more than 4% of the total population in Brighton and Hove (7,425 people) compared with 2.6% nationally⁴ - the 14th highest district in the country⁵.



Combining this Census information on levels of education by population with the Oxford Internet Institute survey results on Internet usage by education gives us an estimate that **the levels of internet usage across Brighton and Hove are 7% higher than the average across England and Wales⁶, or 128,000 adults (62%) have used the internet in Brighton and Hove in the previous 3 month.**

2.2 Household connections across Brighton and Hove

Information on levels of household connections is provided by the Office for National Statistics broken down by household income 10% bands (see the box above on Background - Internet Usage by level of education and income bracket). We can therefore use information on the income breakdown across Brighton and Hove to estimate the levels of household connections across the

³ Source: Census 2001, Office for National Statistics.

⁴ Source: Census 2001, Office for National Statistics.

⁵ Brighton does have the highest proportion of people professing the Jedi religion across the country, another potential indicator of students and young people.

⁶ This tallies with the estimate that cities such as Brighton and Hove will see approximately 10% more internet activity than the national average (Neil Wholey, MORI).

city. However, we must also take into account the specialised nature of the Brighton and Hove economy - local average GDP and earnings are well below the UK and South-East averages⁷, likely in large part to be due to the desirability of the city as a place to live. Simply using income across Brighton and Hove is therefore likely to significantly underestimate internet usage.

Rather than income, we use the levels of education across Brighton and Hove to produce estimates of household connections⁸. By taking a measure of educational achievement as a proxy for income levels across the city we can estimate the levels of household connection. The results in this report are based on the Index of Deprivation 2004 Education and Skills domain at small area level - the distribution of this measure across the city compared with the distribution across England allows us to estimate the proportion of the city within each of the national educational 10% bands, e.g. how much of the city lies in the top 10% of areas across the county in terms of educational achievement, how much of the city lies in the next 10% of areas across the county, and so on?

Combining this education proxy for income 10% bands across the city with the ONS internet survey on household connections by income 10% bands gives us an estimate that **the home internet connection across Brighton and Hove is 13% higher than the average across England⁹, or 62,000 (54%) of households across the city are connected to the internet.** Of these households, over 12,000 will access through broadband connection.

These figures are similar to the South East region as a whole, where internet access is also significantly higher than the national average, despite Brighton and Hove having significantly lower income levels than across the region.

⁷ Source: *Setting the Scene, Review of the Brighton and Hove Economy*, Brighton and Hove City Council, 2001.

⁸ Levels of education are strongly linked to earnings, however in areas such as Brighton and Hove there are additional factors which keep earnings low despite the average high levels of education.

⁹ The Index of Deprivation 2004 Education and Skills domain was used as a proxy for income, with the proportion of areas across Brighton and Hove in each of the England 10% bands used in combination with ONS information on the percentage of homes connected to the internet for each National income 10% band.

2.3 How accurate are these figures?

It is likely that the true figures for internet usage across Brighton and Hove are still higher than these estimates suggest - the concentration of IT and new media businesses and professionals across the city combined with the large population of foreign language students are not accounted for in these estimates. These groups are likely to rely heavily on internet communication, meaning that internet usages across Brighton and Hove is likely to be significantly higher than calculated above.

Unfortunately it is difficult to estimate the impact of these groups of heavy internet users from the information currently available - more detailed research and survey work is required.

Section 3: What are people in Brighton and Hove using the Internet for?

With the information available from the national level surveys on what people are using the internet for, we can estimate the numbers of people across Brighton using the internet for a number of purposes. It is difficult to get a more accurate estimate based on known population characteristics such as education and income, as the survey data is not broken down in this way.

So, our most accurate estimate of what people are doing on the internet is simply the national level proportions applied to our estimates for internet usage across the city calculated above, see "What are we using the internet for?" panel.

What are we using the internet for?

Among those who had used the internet in the previous three months¹⁰:

- “regularly use email” 85%, or 108,800 people in the city
- “search for info on goods and services“ 80%, or 102,400 people
- “search for travel and accommodation info” 69%, or 88,300 people
- ”use the internet to buy goods and services” 59%, or 75,520 people
- “use government related websites” 43%, or 55,040 people

Most frequently visited sites¹¹:

- Educational sites 40%, or 51,200 people in the city
- Hobby related sites 38%, or 48,640 people
- Holiday sites 25%, or 32000 people
- Shopping sites 22%, or 28,160 people
- Banking/personal finance 19%, or 24,320 people
- News sites 19%, or 24,320 people
- Map/travel direction sites 17%, or 21,760 people
- Sports sites 13%, or 16,640 people
- Price comparison sites 10%, or 12,800 people
- recruitment sites 10%, or 12,800 people
- Chat room 9%, or 11,520 people
- Reunion sites 9%, or 11,520 people
- Directory service 9%, or 11,520 people
- Celebrity sites 4%, or 5,120 people
- Share dealing 4%, or 5,120 people
- Other 15%, or 19,200 people
- none of the above 3%, or 3,840 people

¹⁰ Source: Office for National Statistics, *Internet Access report*, July 2003.

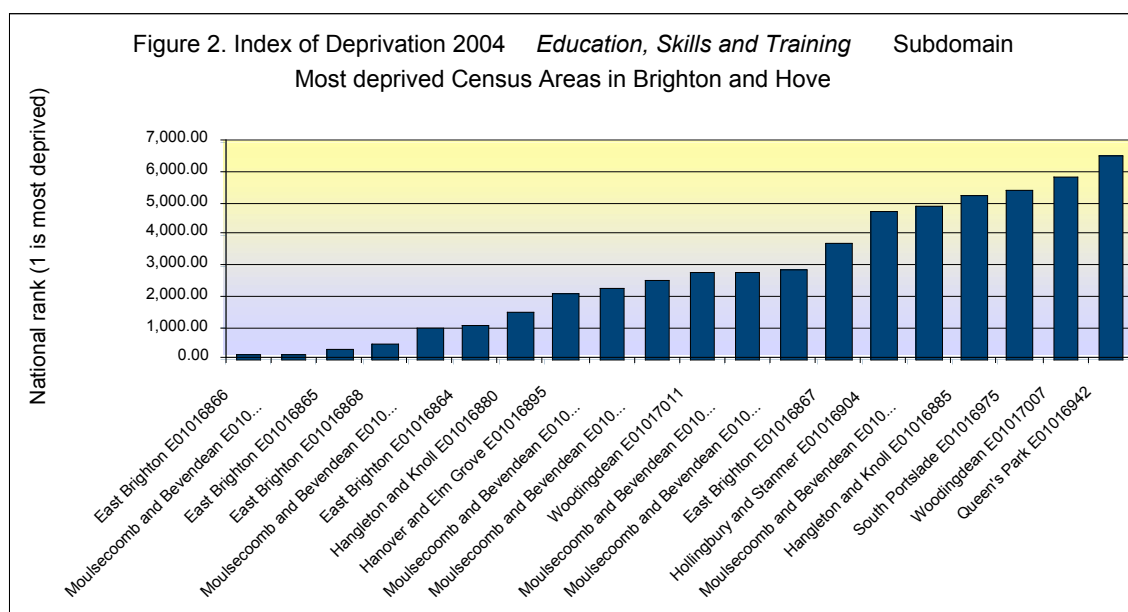
¹¹ Which, *Annual Survey on the Internet 2002*.

Section 4: Areas likely to have low levels of Internet access

Areas with large populations of people with poor or no qualifications are likely to have the lowest rates of internet use and home connection across the city. Figure 2 below shows the top 20 of these areas, based on the Index of Deprivation 2004 Education and Skills domain used in estimating the levels of household connections in section 2.2 above¹².

In particular, areas in East Brighton and Moulscroomb are among the most disadvantaged areas in the country - these are likely to show the lowest levels of internet use across the city, and potentially be the “hardest-to-reach” areas in terms of improving internet access.

Map 1 below shows the Index of Deprivation 2004 Education and Skills domain mapped across the Brighton and Hove area, highlighting the distribution of areas most likely to have low levels of internet access (these areas are coloured dark blue, compared with yellow for the areas most likely to have high levels of internet access)



¹² Source: *Indices of Deprivation 2004*, Office for the Deputy Prime Minister.

Section 5: How can we find out more information?

No information is currently publicly available on levels of internet usage at small area, i.e. below regional level. And information at regional and national level is too limited to enable us to make more accurate predictions of internet usage across areas such as Brighton and Hove. The estimates of internet usage and household connections produced in this report are likely to under-estimate the true levels across the city, due to lack of specific information on the groups likely to be heavy internet users across the city - IT and new media businesses and professionals, also foreign students.

In order to fill this information gap, two possibilities are outlined:

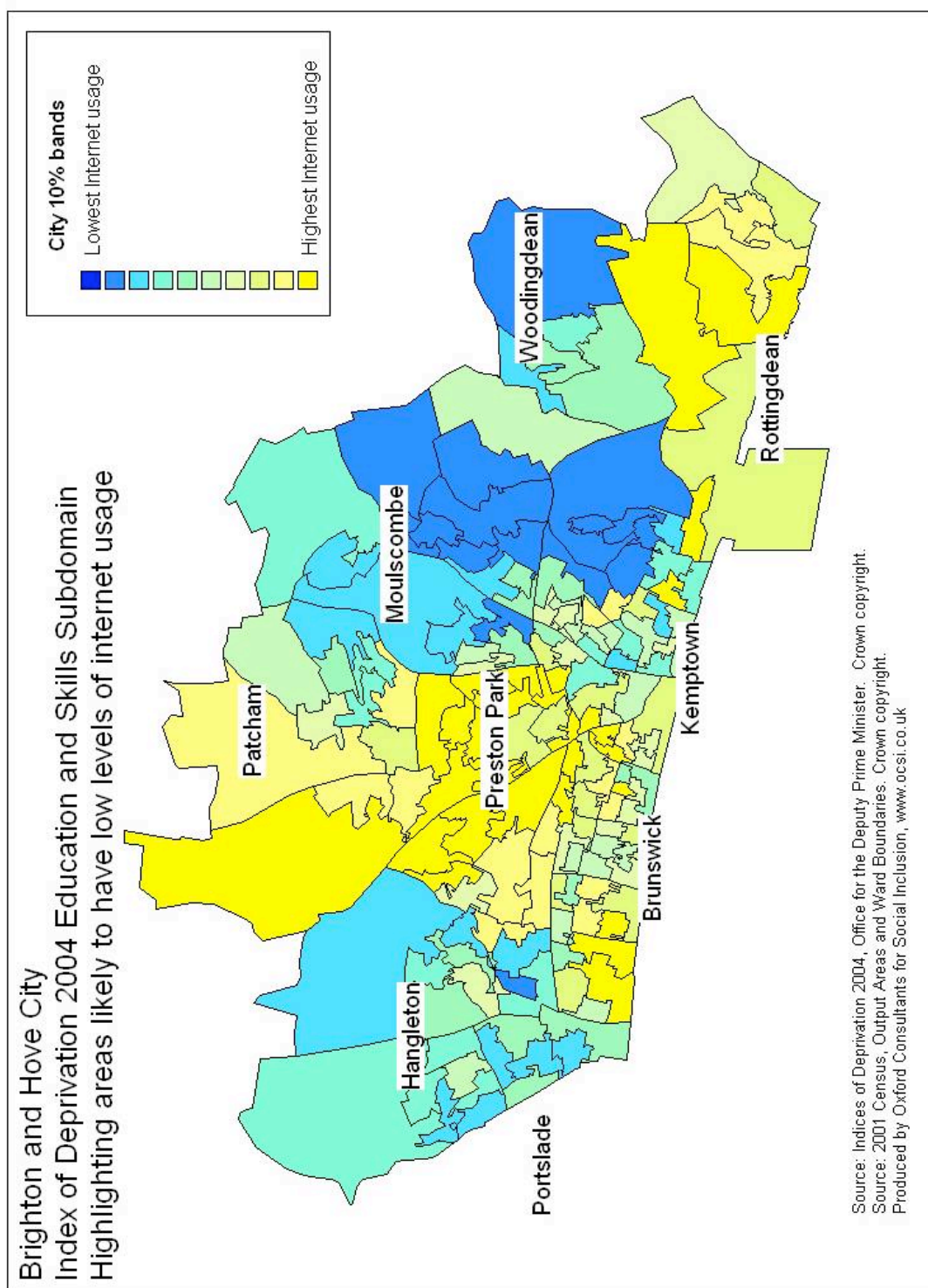
1. The Office for National Statistics (ONS) Omnibus Survey, on which the ONS internet access reports are based, is available to not-for-profit organisations for further use and analysis. It is likely that the numbers involved are too small for serious analysis across Brighton and Hove, however ONS do offer a bespoke data analysis and collection service, which may enable more detailed survey work across Brighton and Hove.
2. A number of commercial market research companies offer bespoke analysis of internet trends, typically based on random sample interviews across an area. Potential companies are listed in Appendix A.

Section 6: Conclusions

This report has produced estimates of internet usage and household connections across Brighton and Hove, by combining information on people using the internet at the national level together with information on people living and working in Brighton and Hove.

We estimate that 128,000 adults across Brighton and Hove have used the internet in the last 3 months - 7% higher than the national average. We also estimate that 62,000 households across the city are connected to the internet (13% higher than the national average) , with 12,000 of these connected to broadband.

These estimates are likely to undercount the true figure, due to large groups of people in the city likely to be heavy internet users, including IT and new media businesses and professionals. More accurate estimates will require detailed survey work.



Map 1. Showing the areas across Brighton and Hove likely to have low levels of internet usage and household connections. Please note this map may not be used outside this report, in particular it may not be incorporated into other reports or passed to the general public.

Appendix A. Information sources and further reading

A.1 Population Demographics

- www.statistics.gov.uk. UK's home for official statistics on economy, population and society at national and local level
- www.statistics.gov.uk/census. Data from the 2001 Census
- www.nomisweb.co.uk. Official labour market statistics
- www.citystats.org. Brighton and Hove statistics and service information

A.2 Brighton information

- www.brightononline.co.uk. Database of Brighton and Hove's shops and businesses
- www.sussexenterprise.co.uk. Sussex business advisory body

A.3 Internet Access Statistics

- www.which.net/surveys. Which annual internet survey, 2002
- users.ox.ac.uk/~oxis. Oxford Internet Institute survey
- www.statistics.gov.uk/StatBase/Product.asp?vlnk=8251. Office for National Statistics internet access Omnibus Survey latest results (June 2004)

A.4 Search engine information

- www.searchtools.com/surveys/survey03/reasons.html
- www.ics.uci.edu/~danyelf/projects/SearchEngineSurvey.html
- www.link2city.com/search_engine_survey.htm
- www.mondosoft.com/behavior-survey.asp
- www.useit.com/about/searchreferrals.html

A.5 Internet research organisations and think-tanks

- www.ippr.org. Debating the research into U.K digital society
- www.idea-knowledge.gov.uk. Government backed improvement and development agency. Useful commentary and debates into the progress of e-government initiatives
- www.oii.ox.ac.uk. Oxford Internet Institute at the University of Oxford
- www.headstar.com. Headstar advise and research on the use of internet for debate and discussion, particularly for local government and public sector organisations

A.6 News items

- news.bbc.co.uk/1/hi/technology/3121950.stm - "Net worth little to many Brits"
- news.bbc.co.uk/1/hi/technology/3005493.stm - "Digital divide hits rural business."

Appendix B. Commercial market research companies

NB This report does not specifically recommend any of the following organisations:

- **Mori** - www.mori.com
- **Netratings** - www.nielsen-netratings.com
- **Harris Interactive** - www.hieurope.com
- **Mintel** - www.mintel.com
- **CACI** - www.caci.co.uk. Demographics services are provided by www.datadepot.co.uk.
- **Forrester** - www.forrester.com
- **Key Note** - www.keynote.co.uk
- **Datamonitor** - www.datamonitor.com

About Oxford Consultants for Social Inclusion

Oxford Consultants for Social Inclusion (OCSI), Oxford University's first spin-out company from the Social Sciences, was launched in October 2003 to help local government and other public sector organisations identify deprived neighbourhoods, target resources, evaluate programme effectiveness and strengthen regeneration bids.

OCSI's consultancy is based on nearly two decades of ground-breaking research at the Social Disadvantage Research Centre (SDRC) in the University's Department of Social Policy and Social Work. The SDRC is a world leader in area-based deprivation research, developing the National Indices of Deprivation, for England, Wales, Northern Ireland, and Scotland.

OCSI consultants combine expertise in area deprivation analysis, social exclusion planning, small area statistics, resource targeting, government policy, geographic information systems (GIS) and database and web development technologies.

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